

***Exercise Guide for
WF220
BEACON SAP Workflow***



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

3.1 – Exercise: Change Priority and Approve a Position PCR

Scenario


A Position Reallocation PCR has been sent to your Inbox. Review the PCR and accompanying note. Change the priority from medium to very high, and then approve it. In this exercise, you are the OM Division/Agency Approver.

After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.

Instructions—Change Priority and Approve PCR

1. Log onto SAP using the **Division/Agency Approver** user ID and password.
2. From the Easy Access screen, click **SAP Business Workplace** .
3. Click the node beside Inbox  to expand it.
4. Double-click **Workflow**. The PCRs that have been sent for approval are listed in the right column.
5. Click  to update the screen. This ensures that the most current PCRs that have been sent to the Inbox display.
6. Select (do not double-click) the applicable PCR (use the PCR and Position assigned to you from the Data Sheet).
7. At the top of the screen, observe the Reserve icon  is active. The Replace icon  is grayed out. You will use these later in the course.
8. In the bottom section of the screen, scroll down and click the link for the OM_Header PCR - <pcr number> Position <position number>. The PCR Position Action Request screen is displayed. Observe there are three tabs (General, Time, and Cost).
9. Click each tab and review the information. Observe that you can view each tab but cannot make any changes to the data.
10. Click **Services for Object**  to review any attachments (or notes) that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
11. Select **Attachment List**. The Services: Attachment list pop-up displays.
12. Highlight the line item for the note, and select **Display** . The Display note pop-up is displayed with the note title and note information.
13. Click  to close the Display note pop-up.

14. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.

15. Click the back button  to return to the Business Workplace for Approver screen.


16. With the applicable PCR still highlighted, click **Other functions** .

17. Select **Change priority**. The Change priority pop-up displays.

18. Use the drop-down in the Priority field to select the **very high** option.



19. Indicate that the selection should continue with subsequent steps.

20. Close the pop-up box.

21. With the applicable PCR still selected, click **Execute**  (or double-click the PCR line item). Observe that you can also see the Header information from this screen.

22. Click the Approve change option. The Workflow item is sent to the next approval (funding) level.

Instructions—View Workflow Tracker

1. From the Easy Access screen, click **SAP Business Workplace** .
2. Click the node beside **Outbox** to  expand it.
3. Double-click **Workflow items executed by me**. The PCRs on which you have taken action (approved, returned or cancelled) are listed in the right column.
4. Select the PCR you want to review.
5. In the bottom section of the screen scroll down and click the link for the **PCR_List: Workflow Tracker**. The Workflow action screen is displayed.
6. Review the screen for details for the Approvers, including the Approver roles as well as date and time processed.
7. Exit the Workflow Tracker back to the Easy Access screen.








This exercise is complete.





3.2 – Exercise: Reserve a Position Change PCR

Scenario

You have received a PCR to change the county of a position. When you review the PCR and the accompanying note, you believe the wrong county has been selected. Use the Reserve function to remove it from Workflow until you complete your research. In this exercise, you are the OM Division/Agency Approver.

Instructions—Reserve the PCR and View the Workflow Log

1. From the Easy Access screen, click **SAP Business Workplace** .
2. Click the node beside **Inbox**  **Inbox** to expand it.
3. Double-click **Workflow**. The PCRs that have been sent for approval are listed in the right column.
4. Click  to update the screen. This ensures that the most current PCRs that have been sent to the Inbox are displayed.
5. Select the applicable PCR.
6. At the bottom section of the screen, scroll down and click the link for the OM_Header PCR - <pcr number> Position <position number>.
7. Review the information. Observe that you can view the information but cannot make any changes to the data.
8. Click **Services for Object**  to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
9. Select **Attachment List**. The Services: Attachment list pop-up is displayed.
10. Highlight the line item for the note, and select **Display** . The Display note pop-up displays with the note title and note information.
11. Click  to close the Display note pop-up.
12. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
13. Click the back button  to return to the Business Workplace for Approver screen.

14. With the applicable PCR selected, click **Reserve** . You have now taken ownership of the workflow item and removed it from the general Inbox of the other Approvers. Observe that the icon for Reserve is now grayed out and the new icon (Replace) is active. You will use Replace when you are ready to put the PCR back into the group of Agents again. At this time, you decide that you still have more research to do, and so you are not ready to put the PCR back into Workflow.
15. Click the **Display Workflow Log**  button to view who the Agents are that were affected by you reserving the PCR.
16. From the “View WF Chronicle” Tab, click the **Agents** icon  **Ready** next to Ready to view the options.
17. Click  **Agents**. This allows you to see the Approvers who would have been able to approve the PCR if you had not reserved it. In your work environment the list will have the Approvers names and ID numbers.
18. Close the Agents pop-up.
19. Exit the Workflow Log back to the Easy Access screen.

This exercise is complete.

4.1 – Exercise: Change Priority and Approve a Promotion PCR

Scenario

A PCR to promote Allison Sellers has been sent to your Inbox. Review the PCR and accompanying note. Change the priority from medium to very high, and then approve it. In this exercise, you are the PA Division/Agency Approver.

After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.

Instructions

1. Using information learned in previous exercises, approve the PCR.
2. After you have approved the PCR view the item in the Workflow Tracker.

This exercise is complete.



4.2 – Exercise: Reject a Salary Adjustment PCR

Scenario

A PCR to give a salary adjustment to Nancy Gonzalez has been sent to your Inbox. Review the PCR and accompanying note, and then reject it. You will be required to write a note explaining to the Initiator why you are rejecting the PCR. In this exercise, you are the PA Division/Agency Approver.

Instructions—Change Priority and Approve PCR

Using information learned in a previous lesson, complete the Exercise. **NOTE:** When you click the Return to Initiator button, a comments screen is displayed. Enter your comments to the Initiator and save. Click the Back button to return to the Inbox.

This exercise is complete.

4.3 – Exercise: Cancel a Suspension PCR

Scenario

A PCR to place Ronald Barr on suspension has been sent to your Inbox. After you view the PCR you decide that you need to research this request. You think the effective date should be earlier than the date on the PCR. After you review the PCR and accompanying note, use the Cancel function to remove it from Workflow until you complete your research. In this exercise, you are the PA Division/Agency Approver.

Instructions—Reserve the PCR and View the Workflow Log

1. Find the applicable PCR and use the Header to review the note.
2. Click the Back button to return to the Approver screen.
3. Observe that the Reserve icon is active. Also notice that the Replace icon is grayed out.
4. With the applicable PCR selected, execute the PCR.
5. Select the Cancel and keep work item in Inbox option. You have now taken ownership of the workflow item and removed it from the general Inbox of the other Agents.
6. Observe that the icon for Reserve is now grayed out, and Replace is active. When you are ready to put the PCR back into the group of Agents again you can use Replace. However, if you are ready to approve it, you can merely click Execute without placing it back into Workflow. The use of the Cancel and Keep work item in Inbox function is the equivalent of using the Reserve button. However, Replace merely puts it back into the Workflow again without any action taken whereas Execute and clicking an option means that you took action on the request.

This exercise is complete.

4.4 – Exercise: Replace PCR and Approve or Send to OSP

Scenario

You have finished researching both the Position County PCR and the Suspension for Ronald Barr. You determined that both PCRs as originally submitted were correct. Process both PCRs. You will approve the Position PCR and send the Suspension PCR to OSP.

NOTE: If you merely wanted to place the PCRs back into the Inbox of all Approvers at your level, instead of executing it, you would use the “Replace” icon to place it back in Workflow.

Instructions—Replace and Approve the PCR

1. Using information you learned in previous Exercises:
 - a. Approve the Position County Change PCR.
 - b. Send the Ronald Barr Suspension PCR to OSP.

This exercise is complete.

5.1 – Exercise: Execute the Workflow Report (PA)

Scenario

You need to see if there are any Suspension and Reallocation PA Actions awaiting approval for the Cultural Resources Org Unit. In addition, you want to change and save the layout to your specifications.

NOTE: For PA Actions use transaction code ZPA0189; for OM use ZOM0178.

Instructions

1. From the Easy Access screen, enter **ZPA0189** into the Command Field.
2. Enter.
3. In the Action Type field, use the matchcode to select the codes for **Suspension to Reallocation**.
4. In the Personnel Area field, use the matchcode to select **Cultural Resources**.
5. Enter and Execute.
6. Click the Change Layout button and move the items listed below from the Displayed columns panel on the left to the Column Set panel on the right:
 - a. SSN (last 4)
 - b. Job key
 - c. First name
 - d. Last name (**NOTE:** Do not remove the column entitled “Name of employee or applicant”).
 - e. Currency
 - f. Work Against
 - g. Changed by
7. Click the green check to close the Change Layout pop-up.
8. Assume you have decided to move the order of the columns. Drag and drop the columns so that they display left to right as shown below:
 - a. PCR ID
 - b. Name of Action type
 - c. Name/reason for Action
 - d. Start Date
 - e. WF Approval level
 - f. Name of Employee or Applicant
9. Click the Save Layout button.
10. In the Save layout field, enter: **ZxxTrng** (where xx = your initials). **NOTE:** When you use the User-specific button, you must begin the field with the letter Z.
11. In the Name field enter **xx (your initials) Training**.



12. Click the User-specific checkbox. This indicates that the layout is restricted to your user ID. If you do not select User-specific, the layout can be used and modified by anyone with the security to run the report.
13. Click the green check. A message displays indicating that the layout is saved.
14. Exit to the Easy Access screen.

This exercise is complete.

5.2 – Exercise: Use a Saved Layout to Run the WF Report

Scenario

You need to see if there are any Promotion PA Actions for Org Unit 4601 (Cultural Resources) awaiting approval. You want to use the layout that you previously saved.

Instructions

1. From the Easy Access screen, enter **ZPA0189** into the Command Field.
2. In the Action Type fields, use the matchcode to select **Promotion**.
3. In the Personnel Area field, use the matchcode to select **Cultural Resources**.
4. Click in the ALV variant field and select the variant you previously saved.
5. Enter and Execute. The report should display with the same layout as in the previous exercise. **NOTE:** If you forget to select the variant prior to executing the report, you can still apply the variant after you are in the report by clicking the Select layout button and choosing the applicable saved layout.

This exercise is complete.

5.3 – Exercise: Execute the Organizational Structure Report

Scenario

You need to see a list of the approvers for OM Action for the following Org Units:

- 20010134 – CR CDS Archives and History
- 20012267 – OSBM Admin Deputy

Instructions

1. From the Easy Access screen, enter **S_AHR_61016528** into the Command Field and press Enter.
2. Ensure that the Planned version field defaults to Current plan; if not, then enter **01**.
3. Enter **O** for Organizational Unit in the Object type field.
4. Leave the default reporting period as Today.
5. In the Evaluation Path field, use the matchcode and wild card (*) to search for the **Z** options. Select **All Agency Approvers for a given Org Unit**.
6. In the Object ID field, use the Multiple Selections option to enter the following Org Unit numbers in the Object ID field:
 - a. 20010134
 - b. 20012267
7. Click the Copy button to close the multiple selections pop-up.
8. Enter and Execute. The reports displays with the first Org Unit (CR CDS Archives and History) expanded. To see the additional Org Units (in this scenario OSBM Admin Deputy) click the node to expand.

Questions

Answer the following questions.

Question 1

What are the titles of the positions assigned as Agency Approvers for Org Unit 20010134?

A.

Question 2

How many positions are assigned as Agency Approvers for Org Unit 20012267 and what is/are the title(s)?

A.

This exercise is complete.

Optional Exercise only for Funding Approvers

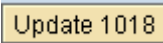

NOTE: The following exercise will only be performed in class if there are Funding Approvers present.

Scenario

You have received a PCR for a Salary Adjustment for Richard Alston. As the funding Approver, you need to split the funding for this position.

Access the PCR and select the Cost tab. Split the funding as detailed in the Instructions section below.

Instructions—Approve PCR

1. Log in as the **Funding Approver**.
2. Access the applicable PCR.
3. At the Funding screen, click the **Cost** tab.
4. Click . The Budget Distribution pop-up is displayed.
5. Enter today's date.
6. On the original cost center line (4610000000) change the percentage to **70**.
7. On the second line, enter the second Cost Center: **4610100000**
8. Enter the second Order number: **100000005364**.
9. In the percentage field enter: **30%**.
10. Enter the funding: **461110001**
11. Press Enter. If an error message indicates that the Functional Area field is required, copy and paste the previous Functional Area into the field.
12. If necessary, enter the salary: **\$23,765**.
13. Enter the reason for the change: **Source of Position's Funds Change**.
14. Click  to close the Budget Distribution pop-up.
15. Save.
16. Click the **Back** button to return to the Decision in Workflow screen.
17. Approve the PCR.

This exercise is complete.